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Want to build a better tech stack? See how these advisors did it
By Rob Burgess
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Every other week for more than six months, we've been bringing you Show Me Your Stack, a series in which financial professionals tell us about the tools they rely on — as well as those they've abandoned.

The feedback from readers has been overwhelmingly positive. A main reason for its popularity has been the granular look it provides inside each firm's tech stack, something you'll find nowhere else.

Fintechs telling you how they're the answer to all your problems are a dime a dozen. Show Me Your Stack goes beyond bromides to tell you both the good and the bad from real users on the ground: the tech that firms use now and what they rejected — and why. The software that does well — and what it could do better. The tech choices that make a firm stand out — and the tech advisors are thinking about changing.

The real value in this series comes from the financial advisors who detail the specific ways their tech decisions solved problems for their firm. Because if a tech stack isn't doing that, what is it even doing?

Scroll down the slideshow to see the tech solutions and setups that work best for a handful of different firms.

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Adding tax tech after a broker-dealer switch

When something changes, it often represents an opportunity to reevaluate.

Ryan Salah, partner and financial advisor at Capital Financial Partners in Towson, Maryland, said his firm's recent switch in broker-dealers allowed him a chance to rethink his tech stack.

As a result, the firm added tax planning software into the mix to give clients greater access to expanded services.

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AI that takes the load off an advisor

While AI tools are often advertised as augmenting not replacing jobs, there's at least one position that has been significantly diminished for Gabriel Kaplan: that of his virtual (human) assistant.

The founder, investment advisor and financial planner at Wealth Habits in White Plains, New York, said he used to give them around 20 hours of work per month before he started using AI tools.

Now he only reaches out when he needs something inside the software itself fixed.

READ MORE: How AI reduced the need for a virtual assistant: Show Me Your Stack

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Tapping tech options from outside the wealth management world

When a piece of software that's made for the industry you're in doesn't work for you personally, then it might be time to think outside the box.

That's exactly what Alvin Carlos, financial planner and managing partner of District Capital Management, in Washington, D.C., did when it came time to pick a new CRM.

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A tech stack for massive growth

The first step to achieving a goal is knowing exactly what you're aiming for.

Though relatively new in his role, Quin Kilgore, chief technology officer of Triad Wealth Partners in Lawrence, Kansas, said his goal for his firm is to more than double the firm's assets under management (AUM) to $1 billion.

To achieve that lofty ambition, he's using AI-based solutions to improve operations.

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This tech stack is built different

If you're using the same tech as everyone else, how will you stand out?

That's the question Grant Blindbury, partner and key member of the management team at FMB Wealth Management in Thousand Oaks, California, asked himself.

The answer was to use something a little less common for essential tasks like financial planning, rather than just copy what everyone else is already using.

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